Date: September 23, 2021

Employee	Post-Travel	Disclosure of	Travel Expenses
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Date/Time Stamp:

Post-Travel Filing Intravel. Submit all form	nstructions: Completens to the Office of Pub	this form within 30 declic Records in 232 Ha	ays of returning from rt Building.	21 SEP 23 PM 12: 57
	ule 35.2(a) and (c), I more me. I also certify that		osures with respect to	travel expenses that have been or wi
	*	rization (Form RE-1), rtification Form with al		y, invitee list, etc.)
Private Sponsor(s) (lis	t all): The Pew Cha	ritable Trusts		
Travel date(s): 9/10/2	2021-9/12/2021			
INCLUDE LODGING O	er: Spouse Costs in Employee	Child		SE OR DEPENDENT CHILD, ONLY
Expenses for Employ	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate ☑ Actual Amount	\$475 total: (\$230/ Amtrak roundtrip \$125.00 - coach bus in NYC \$120 - ferry to and from Ellis Island)	\$286/night \$572 total	\$228 (\$76/day)	none
Expenses for Accomp	panying Spouse or De	pendent Child (if appli	cable):	
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate ☐ Actual Amount				
			1 / 1 / 1	ttach additional pages if scussion on federal recovery
				siness leaders on federal funds
9/23/21 (Date)	Watson (Printed n	ame of traveler)		(Signature of traveler)
TO BE COMPLETED	D BY SUPERVISING	MEMBER/OFFICER:		

I have made a determination that the expenses set out above in connections with travel described in the Employee Pre-Travel Authorization form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

(Signature of Supervising Senator Officer)

(Revised 1/3/11)

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1000000	
1.	Sponsor(s) of the trip (please list all sponsors): The Pew Charitable Trusts
2.	Description of the trip: Bipartisan Senate Chiefs of Staff Conference
3.	Dates of travel: 9/10/2021 - 9/12/2021
4.	Place of travel: New York, NY
5.	Name and title of Senate invitees: Chiefs of Staff (see attached list)
6.	I certify that the trip fits one of the following categories:
	(A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip. - OR -
	(B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
7.	I <i>certify</i> that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
	I <i>certify</i> that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8.	I certify that:
	The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for <i>de minimis</i> lobbyist involvement. - AND -
	The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

USE ONLY IF YOU CHECKED QUESTION 6(B)
I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:
(A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member officer, or employee <i>on any segment</i> of the trip. -OR-
(B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee <i>on any segment</i> of the trip (<i>see questions 6 and 10</i>). -OR-
(C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee <i>at any point</i> throughout the trip.
USE ONLY IF YOU CHECKED QUESTION 9(B) If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:
An itinerary for the trip is attached to this form. I <i>certify</i> that the attached itinerary is a detailed (hourby-hour), complete, and final itinerary for the trip.
Briefly describe the role of each sponsor in organizing and conducting the trip:
The Pew Charitable Trusts is the sole organizer and sponsor of this trip
Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:
See attachment
Briefly describe each sponsor's prior history of sponsoring congressional trips:
Briefly describe each sponsor's prior history of sponsoring congressional trips: See attachment

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Date: September 23, 2021

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15.	Briefly describe the	educational	activities	performed 1	by each	sponsor	(other that	an sponsoring	congressional
	trips):								

see attachment

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
18:J Good Faith estimate D Actual Amounts	\$475 total: (\$230/ Amtrak roundtrip \$125.00 - coach bus in NYC \$120 - ferry to and from Ellis Island)	\$286/night \$572 total	\$228 (\$76/day)	none

17. State whether a) the trip involves an event that is arranged or organized without regard to congressional part1c1pation or b) the trip involves an event that is arranged or organized specifically with regard to congressional participation:

This trip has been arranged specifically with regard to congressional participation

18. Reason for selecting the location of the event or trip

New York was selected, as the weekend coincides with the 20th anniversary of the 9/11 terrorist attacks.

19. Name and location of hotel or other lodging facility:

New York Marriott Downtown

20. Reason(s) for selecting hotel or other lodging facility:

New York Marriott Downtown can provide the necessary meeting space for the planned seminars, is

located in proximity to 9/11 Memorial & Museum and can provide the required number of guest rooms to

accommodate the group

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Fax Number: __

Address: 901 E Street, NW, Washington, DC, 20004

Telephone Number: 202.540.6501

E-mail Address: tluzzatto@pewtrusts.org

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Date: September 23, 2021

DocuSign Envelope ID: 22C6B771-9EBD-42DA-92C9-C7770306CCE9

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

SIGNATURE PAGE FOR ADDITIONAL SPONSOR

(to be completed by each additional sponsor)

I hereby certify that the information contained on pages 1-4 of the certification form and any	,
accompanying addenda, all submitted in connection with the September 10-12, 2021	trip
New York, NY is true, complete, and correct. Dates of Travel (Month Day, Year)	
Place of Travel Docusigned by: Tamera lwyyatto Signature of Travel Sponsor:—0E614E5130D2482	
Name and Title: Tamera Luzzatto, Senior Vice President, Government Relation	ons
Name of Organization: The Pew Charitable Trusts	,
Address: 901 E NW Washington DC 20004	
Telephone Number: 202.540.6501	
Fax Number:	
E-mail Address: tluzzatto@pewtrusts.org	

000000000975

Date: September 23, 2021

Addendum to Private Sponsor Travel Certification Form, The Pew Charitable Trusts Management and Leadership Conference, September 10-12, 2021

New York, NY

- 1-10. See form
- 11. See attachment
- 12. See form
- 13. Through both its information and advocacy work, The Pew Charitable Trusts seeks to inform and advance the development of sound public policy in the United States, as well as to strengthen the institutions that form the foundations of our democracy. A major component of this ongoing strategy has been to help create an environment in which policy makers can productively deliberate important issues of the day. The purpose of the conference is to provide a collaborative environment for the chiefs of staff to learn from experts and discuss issues of importance to an effective legislative process.
- 14. The Pew Charitable Trusts has directly sponsored congressional travel. This will be the eights Senate Chiefs of Staff conference hosted by Pew (2007, 2009, 2011, 2014, 2015, 2017, 2019). In the past, The Pew Charitable Trusts has also funded other institutions via grants to conduct their educational programs and some of these programs may have included congressional travel.
- 15. The Pew Charitable Trusts is driven by the power of knowledge to solve today's most challenging problems. Pew applies a rigorous, analytical approach to improve public policy, inform the public and invigorate civic life. We partner with a diverse range of donors, public and private organizations and concerned citizens who share our commitment to fact-based solutions and goal-driven investments to improve society. Pew issues dozens or research reports each year to educate the public and policy makers. Pew also sponsors convenings of researchers and experts to examine various issues of public policy and civic life.

16-25. See form.

Name of Traveler:

Date/Time Stamp:

Date: September 23, 2021

EMPLOYEE PRE-TRAVEL AUTHORIZATION

<u>Pre-Travel Filing Instructions</u>: Complete and submit this form at least 30 days prior to the travel departure date to the <u>Select Committee on Ethics</u> in <u>SH-220</u>. Incomplete and late travel submissions will <u>not</u> be considered or approved. This form <u>must</u> be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Employing Office/Committee:	Senator Richard Shelby (AL)
Private Sponsor(s) (list all): The Pew Charitable Tru	usts
Travel date(s): September 10-12, 2021	
Note: If you plan to extend the trip for any reason	on you <u>must</u> notify the Committee.
Destination(s): New York, NY	
Explain how this trip is specifically connected to the trav	veler's official or representational duties:
Charitable Trusts host weekly bipartisan discussions led by	age in conversations on management, leadership and civility. The Pew experts in their respective policy fields for Chiefs of Staff, in which the the leadership development and policy insights needed by a Chief of
Name of accompanying family member (if any): n/a	
Relationship to Employee: Spouse Child	
I certify that the information contained in this form is tru	ie complete and correct to the best of my knowledge.
7/29/21 (Date)	(Signature of Employee)
TO BE COMPLETED BY SUPERVISING SENATOR/OFFICE Secretary for the Majority, Secretary for the Minority, and Charles	CER (President of the Senate, Secretary of the Senate, Sergeant at Arms aplain):
Senator Richard Shelby	by authorize Watson Donald
(Print Senator's/Officer's Name)	(Print Traveler's Name)
related expenses for travel to the event described above.	nent or reimbursement for necessary transportation, lodging, and I have determined that this travel is in connection with his or her not create the appearance that he or she is using public office for
I have also determined that the attendance of the employe	ee's spouse or child is appropriate to assist in the representation
of the Senate. (signify "yes" by checking box)	
7/29/21	Richard Halles
(Date)	(Signature of Supervising Senator/Officer)

Watson Donald

(Revised 10/19/15)

Summary - Bipartisan Senate Chiefs of Staff Conference

Page 1 of 2

Summary Agenda

Register Now



Hosted by



Bipartisan Senate Chiefs of Staff Initiative

The Pew Charitable Trusts will host the 8th biennial bipartisan Senate Chiefs of Staff Management and Leadership Conference in New York City from September 10-12. We are planning a special program of remembrances around the 20th anniversary of the attacks on September 11, 2001.

Register By

Contact Us

Date: September 23, 2021

Summary - Bipartisan Senate Chiefs of Staff Conference

Page 2 of 2

2021 12:00
PM ET

© Viewing in Eastern
Time

Register Now using your .gov email

Already registered?

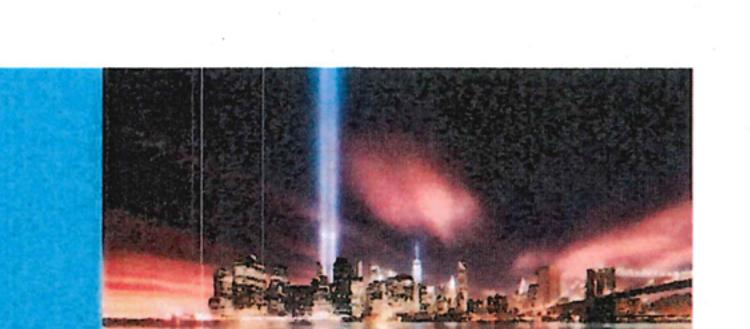
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Date: September 23, 2021

Bipartisan Senate Chiefs of Staff Conference New York City | September 10-12, 2021

Friday, September 10, 2021

10:15am Check in at Union Station, Starlight Lounge behind Gate D

11:05am Depart for NYC via Amtrak 84

Box lunch and beverages provided on board

2:33pm Arrive New York City, Penn Station/Moynihan Hall

3:15pm Check in to Marriott Downtown

85 West Street at Albany Street

6:00pm Meet in hotel lobby for transportation to Gracie Mansion

6:30-8:30pm Reception at Gracie Mansion hosted by Mayor Bill de Blasio

and First Lady Chirlane McCray

Mayor de Blasio and First Lady Chirlane McCray will share reflections on the 9/11 attacks and the nation's largest city's approach to recovery from the effects of the COVID-19 pandemic on the city's economy and its citizens' health.

Saturday, September 11, 2021

7:00-9:30am Breakfast at your leisure

Marriott Hotel

8:30-9:45am Reading of the names of the 9/11 victims

- broadcast in the breakfast room

10:00-11:30am Panel discussion on federal recovery support after 9/11

As discussion of legislation for COVID recovery continues, panelists who were involved in the federal government's

response to 9/11 will discuss their experiences. Tamera Luzzatto (The Pew Charitable Trusts), Polly Trottenberg (United States Deputy Secretary of Transportation), Jim Mazzarella (former Governor Pataki staff), and Glen Caplin (Senator Gillibrand's

office).

11:30am-12:00pm Break

12:00-1:30pm Lunch with speaker from the Pew Research Center

Topic related to Senate duties, general politics data related to 9/11

TBD

000000000980 Date: September 23, 2021 RECEIVED BY: SECRETARY OF THE SENATE

1:30-3:00pm Speaker/Panel TBD – Voices of 9/11

Family members of victims of the 9/11 attack reflect on their

experience and the federal government response.

3:00-5:30pm Break

5:30pm

Meet in Marriott Lobby for walk to ferry to Ellis Island

6:30-7:30pm

Reception on Ellis Island

McRaven

7:30-9:00 Dinner and Keynote address from Admiral William

Admiral McRaven was the chief of the U.S. Special Operations

Command (USSOCOM) which had responsibility for synchronizing Department of Defense plans against global terrorist networks and, as directed, conducting global operations. Under his watch, U.S. Special Operations Forces delivered what will be perhapsviewed as the crowning victory in America's war against terror: The May 2011 raid that killed al-Qaeda leader Osama bin Laden. After retiring from military service, hewent on to serve as chancellor of the University of Texas and is recognized

for his inspirational speeches and writing on leadership.

Sunday, September 12, 2021

7:00-8:00am Breakfast at your leisure,

Marriott Hotel

8:00-9:00am Visit to the 9/11 Tribute Museum

9:30am Meet in lobby for checking out and transportation to the

IAC Building, 555 West 18th Street.

10:00am-11:00am Session with New York City business leaders

Walk to Little Island

A panel of four small business owners led by Asahi Pompey, Global Head of

Corporate Engagement, Goldman Sachs.

Panel discussion of the overall economic impact of the pandemic and federal 11:00am-12:00pm

> interventions to support recovery including Darren Walker, President of Ford Foundation; Jon Gray, President of Blackstone; and Anand Selva, CEO of Citi's Global Consumer Bank, and Joey Levin, CEO of IAC. Moderated by Kathryn

Wylde, President of the non-profit Partnership for New York City.

Presentation by Barry Diller, Chairman of IAC, and Diane von Furstenberg 12:00pm-12:30pm

Picnic lunch.

2:15pm-2:45pm Transportation to Penn Station

12:30pm-2:00pm

Depart Penn Station/Moynihan Hall for Washington via Amtrak 189 4:05pm

Snacks and beverages provided on board

7:35pm Arrive Union Station Washington, DC

View in web browser





Bipartisan Senate Chiefs of Staff Conference

The Pew Charitable Trusts

Invites You and Your Spouse/Significant Other To the 8th Biennial

Senate Chiefs of Staff Management and Leadership Conference

New York City September 10–12, 2021

The Pew Charitable Trusts will host a conference for the Senate Chiefs of Staff from September 10-12, 2021, in New York City. It promises to be an engaging and in formative weekend where you can learn from some of the most interesting speakers on management, leadership and civility today. A copy of the agenda is available here.

We will depart from Union Station on Friday, September 10 on a private rail car and return on Sunday, September 12. Chiefs' expenses (minus alcohol and entertainment) are covered by The Pew Charitable Trusts. If you wish to invite your spouse, you may reimburse Pew for those expenses (estimated to be at least \$800 due to cost of needed travel during this weekend in NYC) after the

Your pre-travel paperwork should be received by the Select
Committee on Ethics, 220 Hart, by Monday, August 9, 2021 to
ensure processing by the legal deadline. The Committee is very
strict about their deadlines and will bar attendance by staff who
submit late. For that reason, we recommend you complete and
submit immediately even if you're not sure you'll attend as there is no
penalty if you're approved but later decide you can't attend (other
than we need to know as soon as possible if you change your mind).
Click here to download the paperwork.

CLICK HERE TO REGISTER (USE GOV EMAIL)

If you are unable to attend, please click here

We look forward to seeing you in New York City this fall!

Tamera Luzzatto
Senior Vice President, Government Relations
The Pew Charitable Trusts
tluzzatto@pewtrusts.org
(202) 540-6501

The Pew Charitable Trusts makes every effort to comply with federal, state, and local government ethics rules, including when hosting events. Please make sure that your participation is consistent with applicable ethics rules.

This email was sent to marli_pasternak@cardin.senate.gov

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Bipartisan Senate Chiefs of Staff Conference September 10-12, 2021 **List of Invited Staff**

LIST OF THE	nteu Staff		
First	Last	Senator	State
Steve	Abbott	Senator Collins	ME
Michelle	Altman	Senator Lankford	ОК
Rebecca	Avitia	Senator Heinrich	NM
Allyson	Bell	Senator Lee	UT
Rey	Benitez	Senator Ossoff	GA
Sarah	Benzing	Senator Brown	ОН
Stephen	Boyd	Senator Tuberville	AL
Dan	Brandt	Senator Toomey	PA
Joel	Brubraker	Senator Capito	wv
Jami	Burgess	Senator Cantwell	WA
Larry	Burton	Senator Sullivan	AK
Neil	Campbell	Senator Reed	RI
Craig	Carbone	Senator Rick Scott	FL
Terry	Carmack	Senator McConnell	KY
Steve	Chartan	Senator Cruz	TX
Kyle	Chase	Senator Rounds	SD
Dara	Cohen	Senator Rosen	NV
John	Connell	Senator Young	IN
Kathleen	Connery Dawe	Senator King	ME
Doug	Coutts	Senator Cotton	AR
Jen	Cox	Senator Kelly	AZ
Aaron	Cummings	Senator Grassley	IA
Doug	Davis	Senator Hyde-Smith	MS
Jennifer	DeCasper	Senator Tim Scott	SC
Watson	Donald	Senator Shelby	AL
Jon	Donenberg	Senator Warren	MA
JP	Dowd	Senator Leahy	VT
Veronica	Duron	Senator Booker	NJ
Tony	Eberhard	Senator Hoeven	ND
Eric	Einhorn	Senator Schatz	Н
Scott	Fairchild	Senator Cortez Masto	NV
Elizabeth	Falcone	Senator Warner	VA
Sean	Farrell	Senator Blackburn	TN
less	Fassler	Senator Gillibrand	NY
Kaleb	Froehlich	Senator Murkowski	AK
Kristen	Gentile	Senator Casey	PA
₋isa	Goeas	Senator Ernst	IA
Vlarc	Goldberg	Senator Hassan	NH
David	Grannis	Senator Feinstein	CA
Vlark	Gruman	Senator Cramer	ND
Coti	Haia	Senator Hirono	HI
Villiam	Henderson	Senator Paul	KY
∕like	Henry	Senator Kaine	VA

Bipartisan Senate Chiefs of Staff Conference September 10-12, 2021 **List of Invited Staff**

Allison	Herwitt	Senator Murphy	C
Natasha	, including	Senator Burr	N
Toni-Ma	rie Higgins	Senator Boozman	Al
Luke	Holland	Senator Inhofe	OI
Beth	Jafari	Senator Cornyn	T)
Liz	Johnson	Senator Romney	U
Meg	Joseph	Senator Sinema	AZ
Josh	Karetny (acting	Senator Whitehouse	RI
Joshua	Kelley	Senator Braun	IN
James	Kelly	Senator Moran	KS
Joel	Kelsey	Senator Blumenthal	СТ
Lindsey	Kerr	Senator Klobuchar	MN
Chad	Kreikemeier	Seantor Shaheen	NH
Dan	Kunsman	Senator Barrasso	· WY
Dylan	Laslovich	Senator Tester	MT
Ted	Lehman	Senator Tillis	NC
Emily	Leviner	Senator Fischer	NE
Mark	Libell	Senator Warnock	GA
Mindi	Linquist	Senator Murray	WA
Jeff	Lomonaco	Senator Smith	MN
Chris	Lynch	Senator Cardin	MD
Mike	Lynch	Senator Schumer	NY
Stacy Kirtan	McBride	Senator Blunt	MO
Jeff	Mehta	Senator Hickenlooper	CO
David	Michels	Senator Wyden	OR
Mike	Montes	Senator Padilla	CA
Ryan	Needham	Senator Rubio	FL
Richard	Nelson	Senator Thune	SD
Kyle	Perry Plotkin	Senator Graham	SC
James		Senator Hawley	MO
John	Quinn	Senator Cassidy	LA
Misty	Rader	Senator Hagerty	TN
Ken	Rebik	Senator Sanders	VT
Michelle	Reidy	Senator Baldwin	WI
Sean	Richardson	Senator Wicker	MS
Brent	Riley Robertson	Senator Johnson	WI
Nick	Rossi	Senator Marshall	KS
Tricia	Russell	Senator Thune	SD
Carlos	Sanchez	Senator Van Hollen	MD
Ray	Sass	Senator Lujan	NM
Rob	Skjonsberg	Senator Sasse	NE
Jess	Smith	Senator Rounds	SD
Kevin	C	Senator Bennet	CO
		Senator Portman	ОН

Bipartisan Senate Chiefs of Staff Conference September 10-12, 2021 List of Invited Staff

,			
Sharon	Soderstrom	Senator McConnell	K
Patrick	Souders	Senator Durbin	IL
Emily	Spain	Senator Carper	DE
Jonathan	Stahler	Senator Coons	DE
Caitlyn	Stephenson	Seantor Peters	M
David	Stokes	Senator Kennedy	LA
Jason	Thielman	Senator Daines	M
Kalina	Thompson	Senator Duckworth	· IL
Jason	Tuber	Senator Menendez	NJ
Matt	VanKuiken	Senator Stabenow	MI
Erin	Vaughn	Senator Schumer	NY
Kristin	Walker	Senator Lummis	WY
John	Walsh	Senator Markey	MA
Lance	West	Senator Manchin	WV
Susan	Wheeler	Senator Crapo	ID
Ryan	White	Senator Risch	
Alan	Yamamoto	Senator Hirono	ID
Michael	Zamore	Senator Merkley	HI
		- Ciracor Interkiey	OR